



Data Mapping

Acquisition Regulations

March 22, 2000



Data mapping: *Acquisition Regulations*

The site system administrator (SA) will maintain the acquisition regulations.

Accessing the Acquisition Regulations

To access the *Acquisition Regulation Research Browser*, users will click the *Acquisition Regulations* icon from the CSTAR desktop (fig. 1).

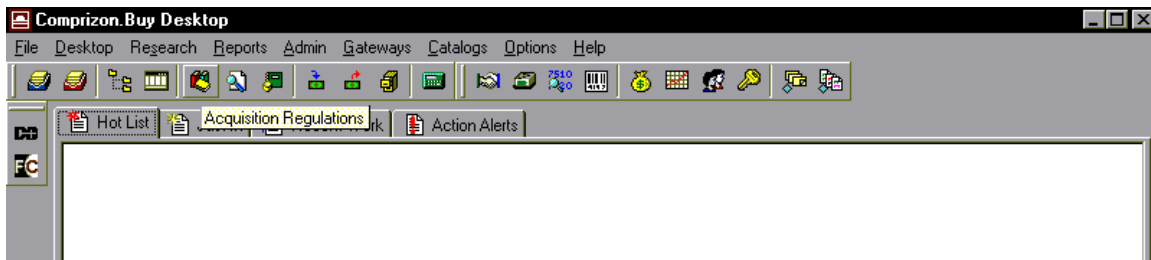


Figure 1 – CSTARS desktop – *Acquisition Regulations* icon

The *Acquisition Regulation Research Browser* will display (fig. 2).

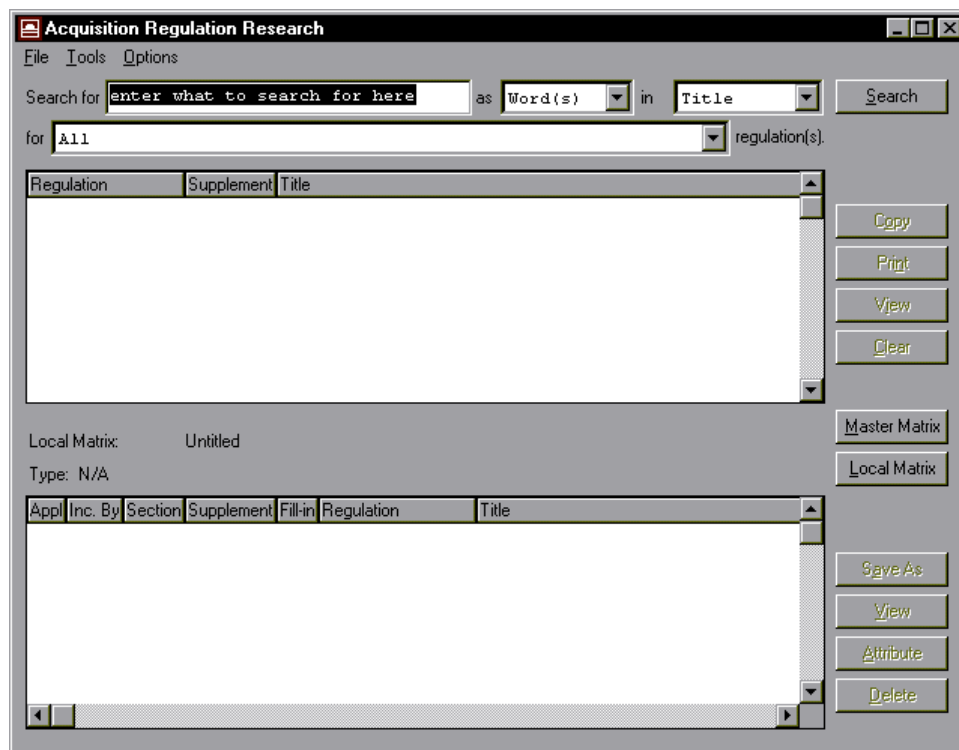


Figure 2 – *Acquisition Regulation Research Browser*

Select Clause Type

The two types of local clauses are the following:

- Approved – indicates local clauses that have been site approved for use.
- Non-Approved - indicates local clauses that have not yet been site approved for use.

From the *Acquisition Regulation Research Browser*, SA will select the *File/Local Clauses/Approved or Non-Approved* sub menu options.

For the following exercise, users will select *Approved* sub menu option.

Add a New Local Clause

To add a new clause, click the *New* button from within the *Acquisition Regulation Research Browser*, that will display the *Create/Edit Local Clause Screen*.

Enter the clause name or number (fig. 3) and click the *OK* button.

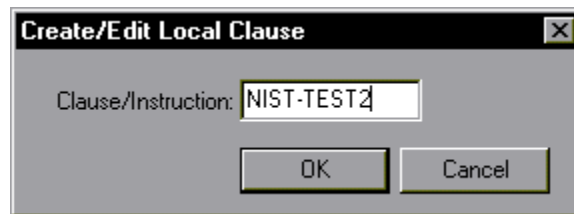


Figure 3 – Create/Edit Local Clause Screen

Field Name	Field Description
Clause Name/Number field	Enter the clause name or number Field Length: Max. 13 alphanumeric characters

From the *Create/Edit Local Clause Screen*, users will enter the following:

- **Clause Titles:**
 - The title of the local clause must be the first text entered, the first line on the screen, and the title must be entered in all uppercase text. Each title line of text must be preceded with two carats (^^) with no spaces, left justified.
Example: ^^NIST-TEST1
^^SHIPPING INSTRUCTIONS

- **Clause Instructions:**
 - Instructional text that displays on the screen, but that does not print. To include the instruction text within a local clause, each text line must be left justified, and preceded by two “@@” symbols with no spaces.
Example: @@The following is the purpose of the clause
@@that will display when printing.
- **Fill-In Help Message:**
 - Each line of the fill-in message text must be preceded by the (%%) symbol with no spaces.
Example: %%Enter the specifics of the shipping conditions.
- **Fill-In Coding:**
 - To enter lines of text to include word-wrapping capability, the SA will need to include the following code **7501 at the end of the word wrapped text. Each line of the fill-in message text must be preceded by the (%%) symbol with no spaces.
Example: %%Enter the specifics of the shipping conditions.
Shipping will be accepted during the following dates and
hours **7501
 - To enter lines of text to display text in a columnar format, the SA will need to include the following code **7504 at the end of the portion of text. Each line of the fill-in message text must be preceded by the (%%) symbol with no spaces.
Example: %%Enter the specifics of the shipping addresses.
All shipping deliveries must be made to: **7504
- **End of the Clause:**
 - Text that is entered at the end of the clause message informs users that they are at the end of the clause. In addition, the title must be entered in all uppercase text.
Example: (END OF CLAUSE)

When finished, the *Create/Edit Local Clause Screen* should display the following below (fig. 4).

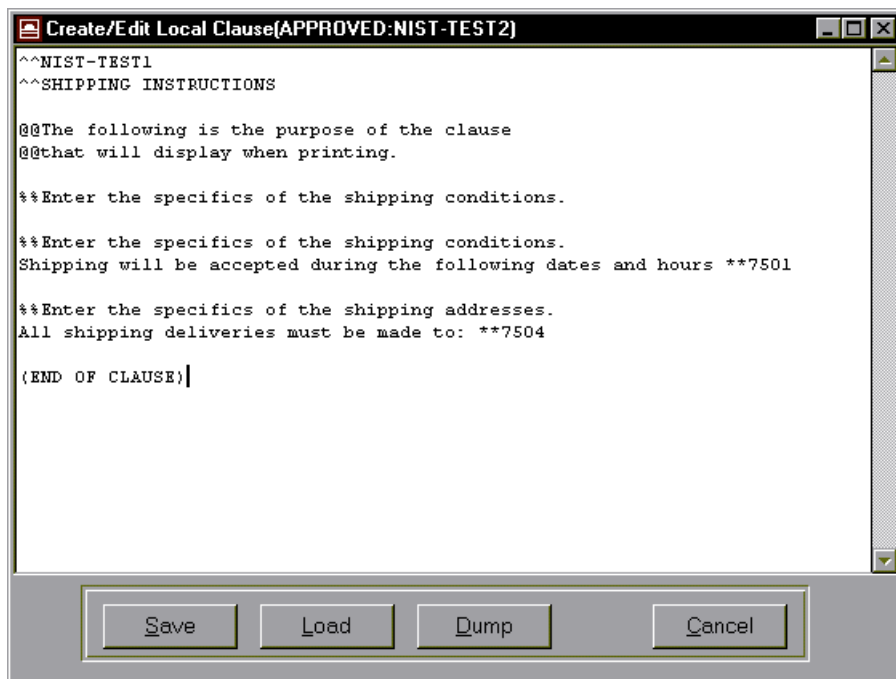


Figure 4 – Create/Edit Local Clause Screen

When finished, users will click the *Save* button that will save and load the new clause information into the CSTARS database.

The *Add to Local Matrices Screen* will display (fig. 5).

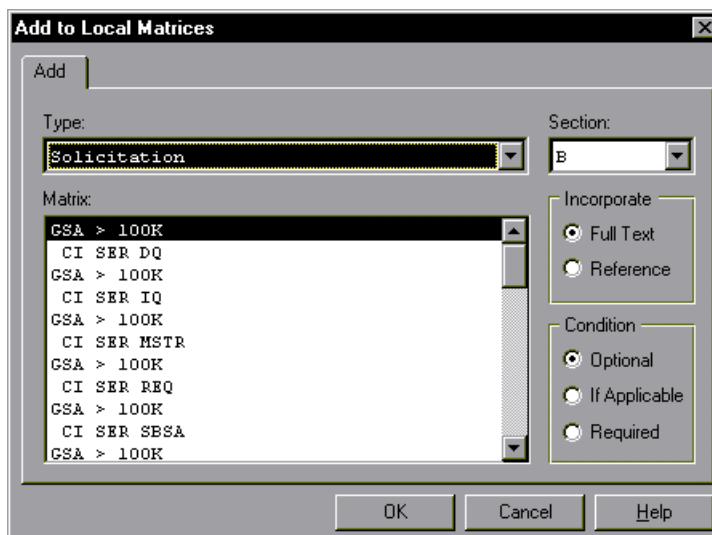


Figure 5 – Add to Local Matrices Screen

From the *Add to Local Matrices Screen*, select the appropriate type of matrix (fig. 6).

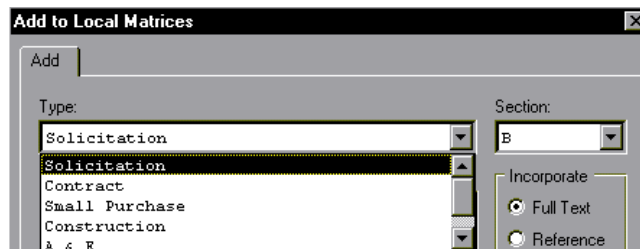


Figure 6 – Add to Local Matrices Screen – Matrices Type

Select the appropriate section that the clause needs to be added (fig. 7).



Figure 7 – Add to Local Matrices Screen – Section

Continue to indicate if the clause text will display and print as either radio option “Full Text” or “Reference Text.” Then specify the condition whether the clause is “Required,” “Optional,” or “If Applicable.”

Note: If “Required” is selected for the new clause, under no circumstances can the clause be deleted from the matrix.

Lastly, users will select from the list of “Matrix,” based on the matrix type specified (fig. 8).

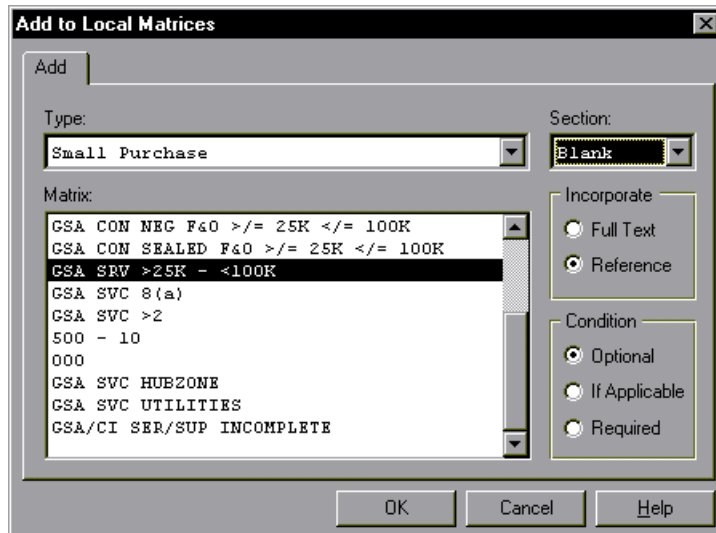


Figure 8 – Add to Local Matrices Screen

When finished, users will click the *OK* button that will return users to the *Acquisition Regulation Research Browser* that displays the new clause (fig. 9).

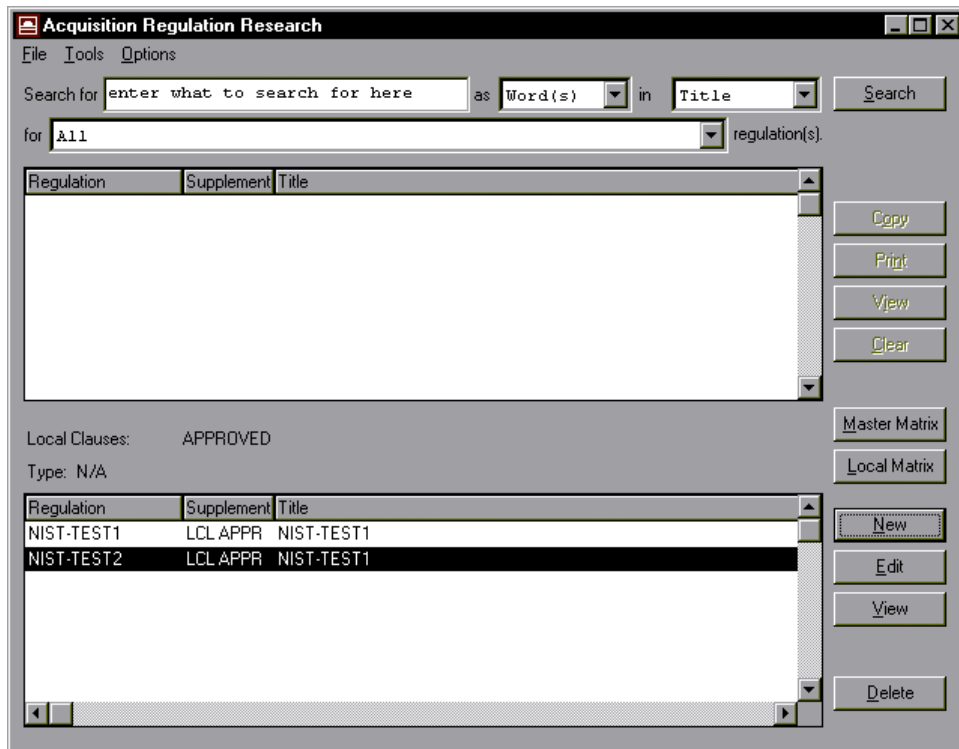


Figure 9 – Acquisition Regulation Research Browser

Edit/Update the Existing Local Clause

To edit or update the existing local clause, users will highlight the local clause, then click the *Edit* button from the *Acquisition Regulation Research Browser*.

When finished, users will save changes by clicking the *Save* button and return to the *Acquisition Regulation Research Browser*.

View the Existing Local Clause

To view the existing local clause, users will highlight the local clause, then click the *View* button from the *Acquisition Regulation Research Browser*.

When finished, users will either click the *OK* button or click the *Cancel* button and return to the *Acquisition Regulation Research Browser*.

Delete the Existing Local Clause

To delete the existing local clause, users will highlight the local clause, and click the *Delete* button.

The following message will display (fig. 10).

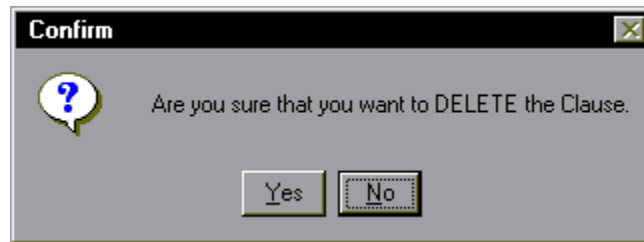


Figure 10 – Message Screen

Users will click “Yes” to delete the local clause, or click “No” to cancel the deletion process and return to the *Acquisition Regulation Research Browser*.

Local Matrix

To open the local matrix that contains the new local clause, click the *Local Matrix* button that will display the *Local Matrix Screen* from the *Acquisition Regulations Research Browser* (fig. 11).

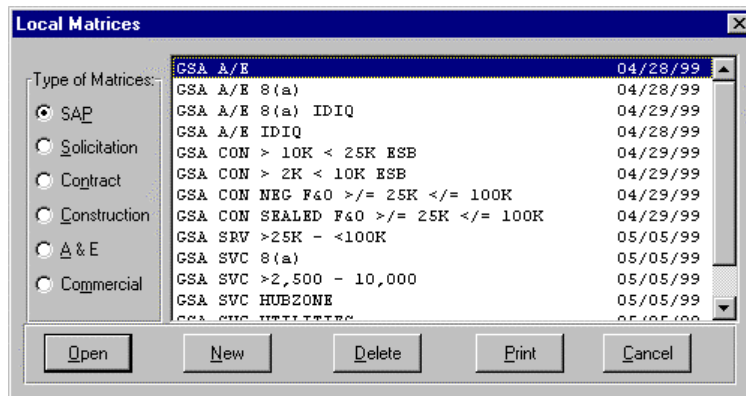


Figure 11 - Local Matrix Screen

Scroll through the list, and highlight the matrix named "GSA SRV>25K - <100K" from the list that users created that contains the newly created clause (fig. 12).

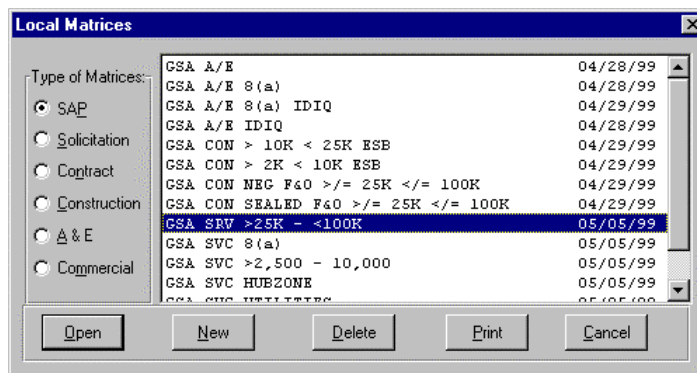


Figure 12 - Local Matrix Screen

Then click the *Open* button that will display the local matrix as "GSA SRV >25K - <100K", the matrix type as "Simplified Acquisitions" (fig. 13).

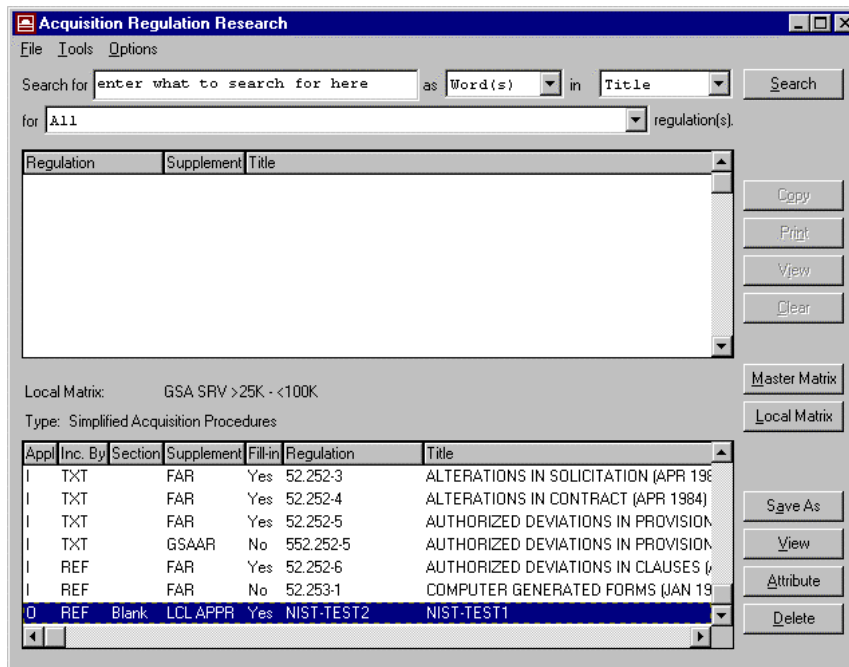


Figure 13 - Acquisition Regulations Research Browser

Scroll down in the list and locate the newly created local clause "NIST-TEST2."

New Matrix Name

To name a new matrix, click the *Save As* button from the *Acquisition Regulations Research Browser* that will display the *Matrix Name Screen* (fig. 14).

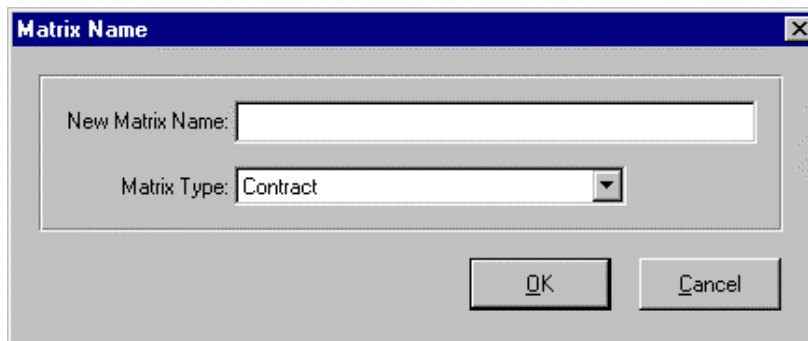


Figure 14 - Matrix Name Screen

Users will enter the new matrix name, select the matrix type, and click the *OK* button that will return he/she to the *Local Matrices Screen*.

Create a Local Matrix

To create a local matrix, users will click on the *Local Matrix* button that will display the *Local Matrices Screen* (fig. 15).

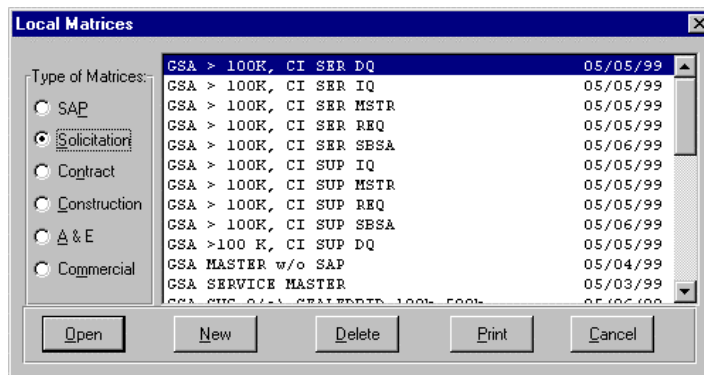


Figure 15 – Local Matrices Screen

Be sure to select the type of matrix to be created for this example: *Solicitation* matrixes type, then click the *New* button to display the *Create New Matrix Screen*. Users will enter the name of the matrix (fig. 16).

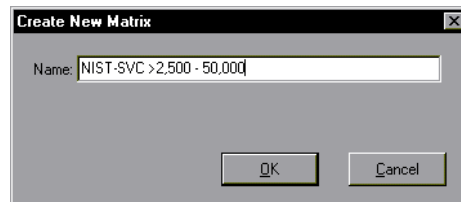


Figure 16 – Create New Matrix Screen

When finished, users will click the *OK* button, and return to the *Local Matrices Screen* scroll through the list to display the newly created matrix "NIST-SVC >2,500 - 50,000" within the list, under the *Solicitation* matrix type (fig. 17).

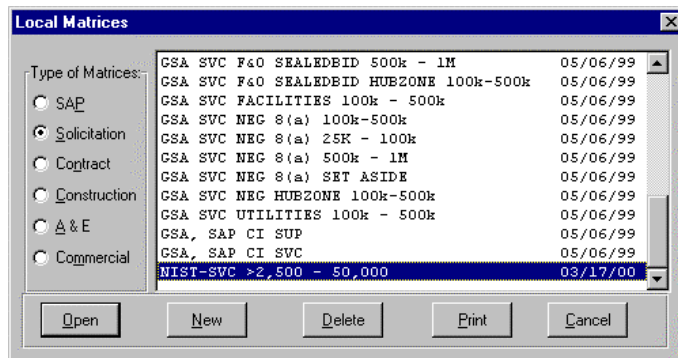


Figure 17 – Local Matrices Screen

Copy Master Matrix Clauses to a Local Matrix

To attach clauses to the new matrix, users will first need to open the matrix for use, for this example open the matrix "NIST-SVC >2,500 - 50,000", by clicking the *Open* button from the *Local Matrices Screen* that will display the newly created matrix within the bottom portion of the screen (fig. 18).

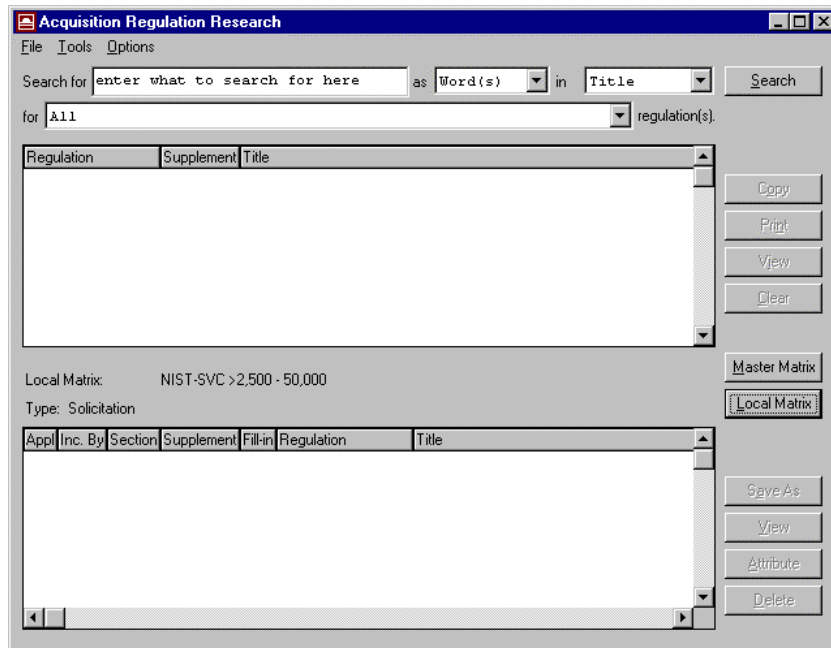


Figure 18 – Acquisition Regulations Research Browser

Begin by copying the FAR master matrices to the newly created matrix, by clicking on the *Master Matrix* button from the *Acquisition Regulations Research Browser*.

The *Master Matrices Screen* will display. Users will click the drop-down arrow and select from a list of 17 master matrices from which the local matrix may be built (fig. 19).



Figure 19 - Master Matrices Screen

Select a master matrix from the list (fig. 20).

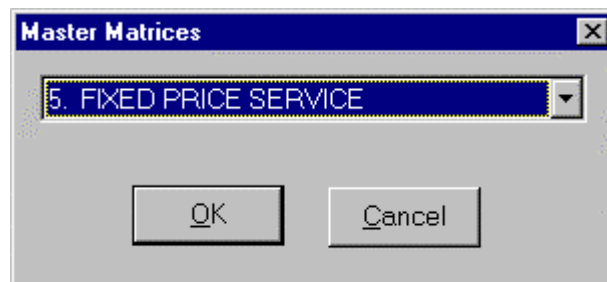


Figure 20 - Master Matrices Screen

Click the *OK* button that will return users to the *Acquisition Regulation Research Browser* which will copy all clauses that are associated with the particular master matrix selected (fig. 21).

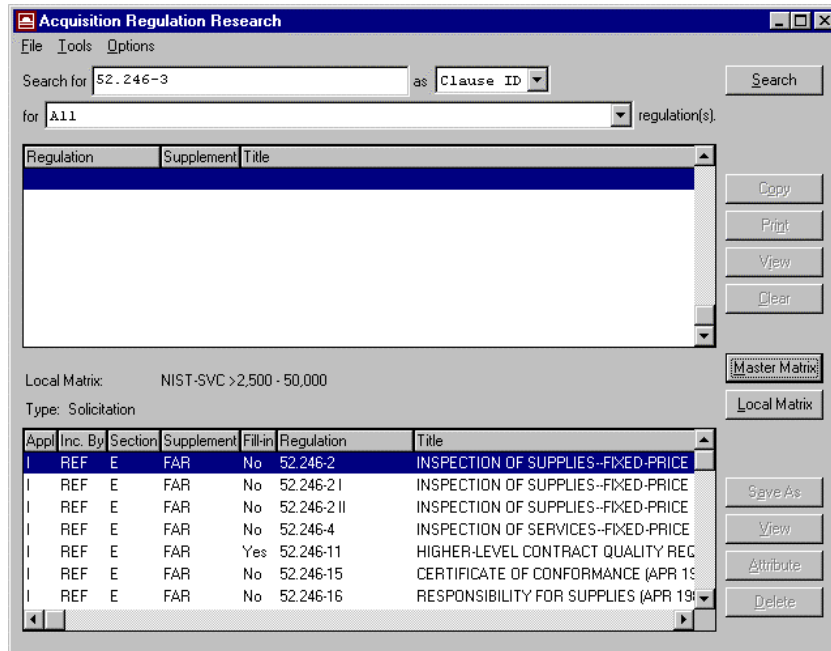


Figure 21 - Acquisition Regulation Research Browser

Once users have copied the master matrix clauses into the local matrix, he/she will be able to add or delete clauses as necessary.

Search for Local Clauses

SA will have the ability to search for clauses that need to be added to a matrix.

Users will be able to search clauses by word, phrase, or clause ID. In addition, users will be able to search within the title only or within the entire clause or instruction.

First, users may search for clauses from within the *Acquisition Regulation Research Browser* by entering text within the "Search For" field.

For this example, enter the word "services" (fig. 22).



Figure 22 - Acquisition Regulation Research Browser

A drop-down list of three chooses to search clauses by are: Word(s), Phrase, or Clause ID.

Users may click the drop-down arrow next to the word “as” and select “Words” (fig. 23).

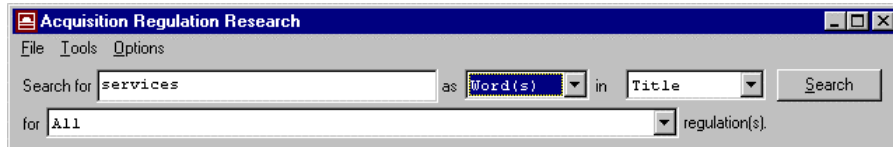


Figure 23 – Acquisition Regulation Research Browser – Search function

To search for clauses by title, clause, or instruction users would click the drop-down arrow next to the word “in.”

For this example, users will select the “Title” option (fig. 24).

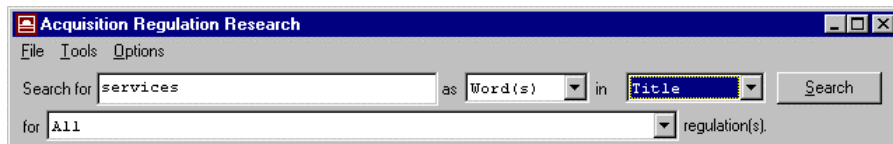


Figure 24 – Acquisition Regulation Research Browser – Search function

To perform the search users will need to click the *Search* button from the browser (fig. 25).

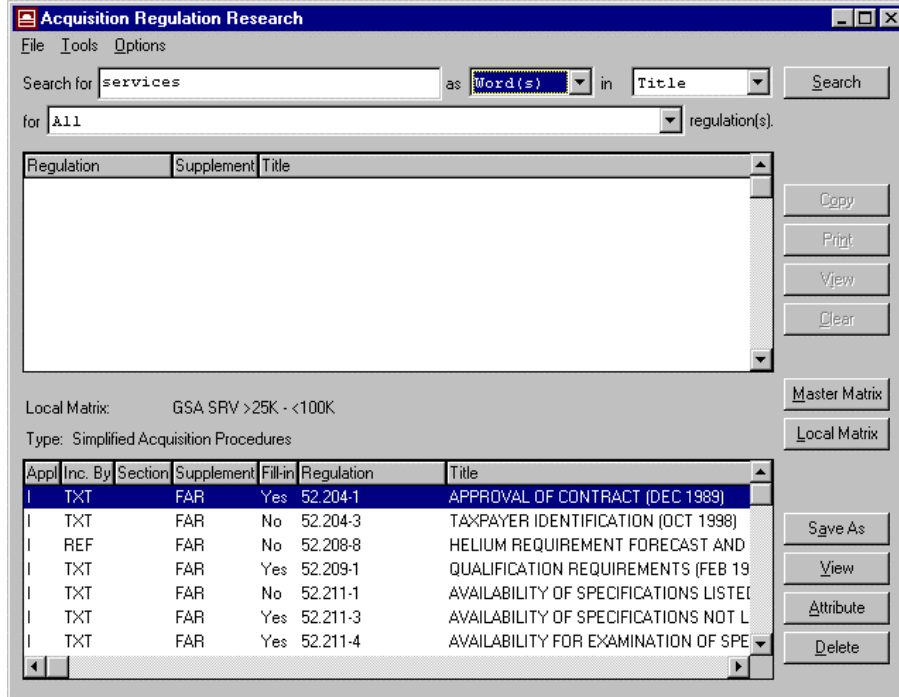


Figure 25 – Acquisition Regulations Research Browser

The *Acquisition Regulation Research Browser* will display the local clauses based on the search criteria (fig. 26).

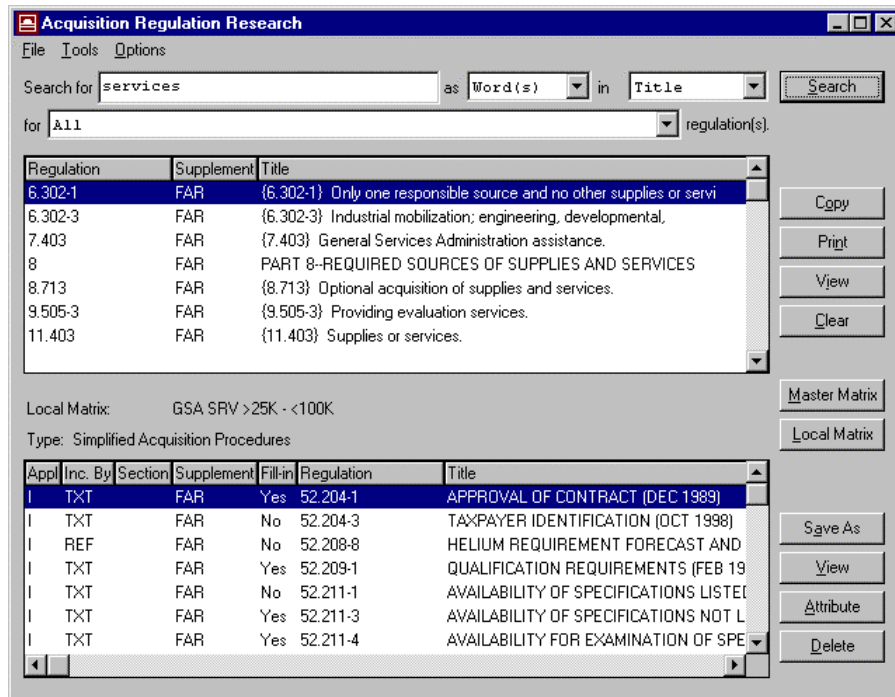


Figure 26 – Acquisition Regulations Research Browser - Search results

Adding Clauses to the New Matrix

In order for clauses to be added to the newly created matrix, users will need to copy individual clauses from within the upper portion of the *Acquisition Regulation Research Browser*.

Highlight the clause from the upper portion of the browser, that users would like to copy (fig. 27).

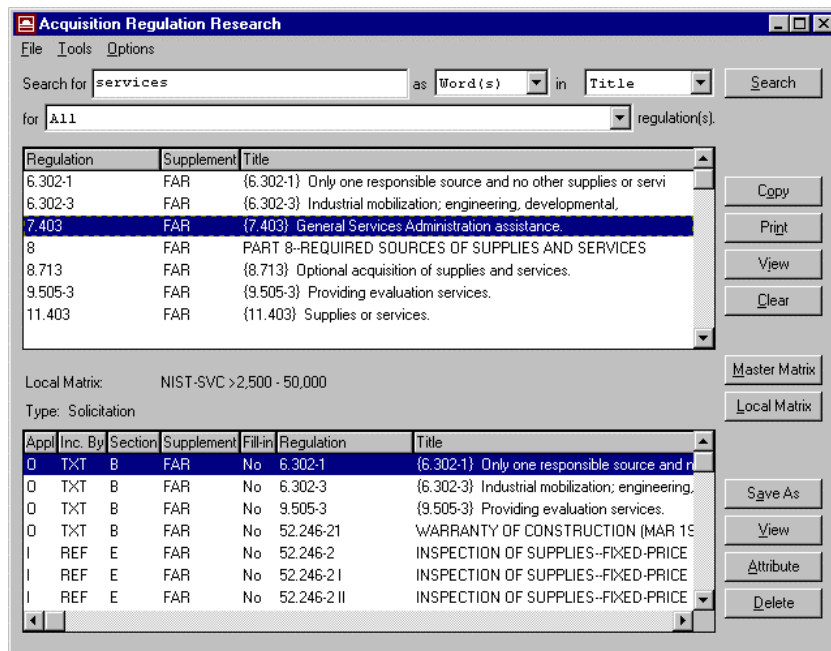


Figure 27 – Acquisition Regulations Research Browser - Search results

Click the *Copy* button that will display the *Attributes Screen* (fig. 28).

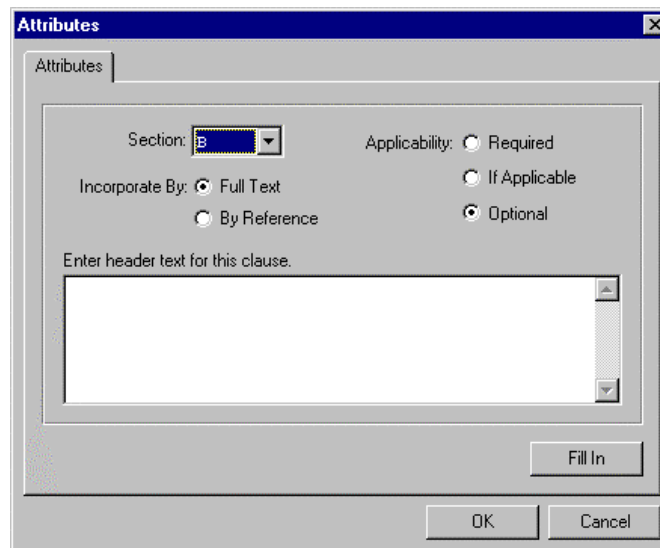


Figure 28 – Attributes Screen

From the *Attributes Screen*, users will be able to copy the clause to the local matrix, by clicking the *OK* button.

Users will return to the *Acquisition Regulation Research Browser* that will display the newly copied clause within the matrix (view matrix and clauses within the lower portion of the screen) (fig. 29).

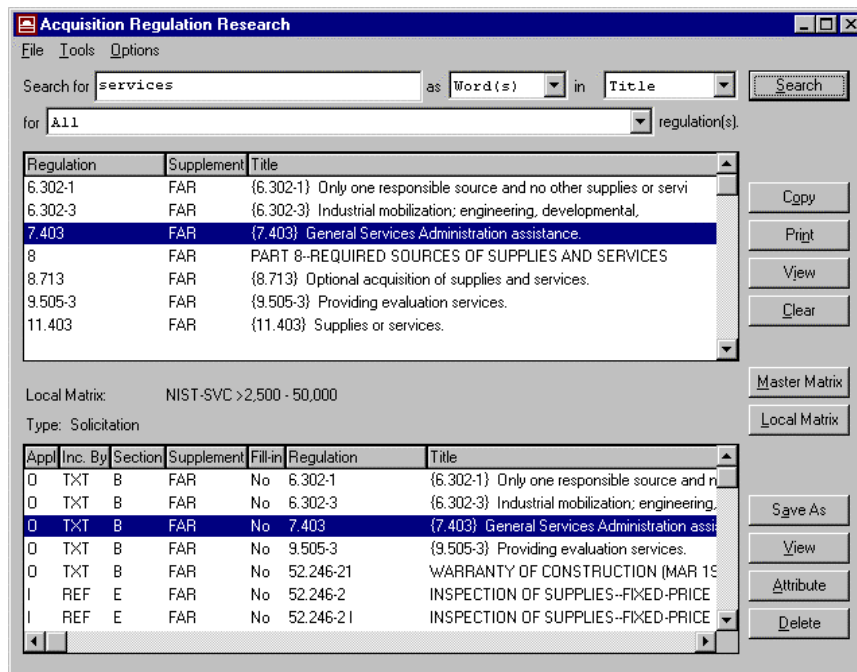


Figure 29 – Acquisition Regulation Research Browser

Change Attributes

To change the attributes of a clause, highlight the clause from within the lower portion of the *Acquisition Regulation Research Browser* and click on the *Attributes* button (fig. 30).

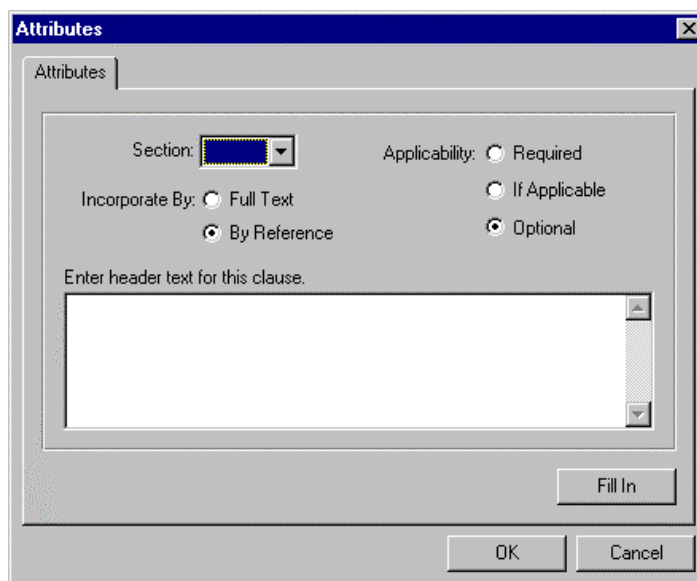


Figure 30 – Attributes Screen

Users will specify the following:

- Section Number that the clause will be stored

- Applicability (users will select one of the following)
 - Required
 - If Applicable
 - Optional
- Incorporate By (users will select one of the following)
 - Full Text
 - By Reference

Users will click the *OK* button and return to the *Acquisition Regulation Research Browser* that will display the changes made to the selected clause.

Add fill-in's for Local Clauses

From the *Acquisition Regulation Research Browser*, highlight a clause (from within the lower portion of the browser) that contains/needs fill-in's.

Note: *Locate a clause listed that contains the word "Yes" within the Fill-In column.*

From the *Acquisition Regulations Research Browser*, click the *Attributes* button.

The *Attributes Screen* will display. Click the *Fill-In* button that will display the *Fill-In Screen* (fig. 31).

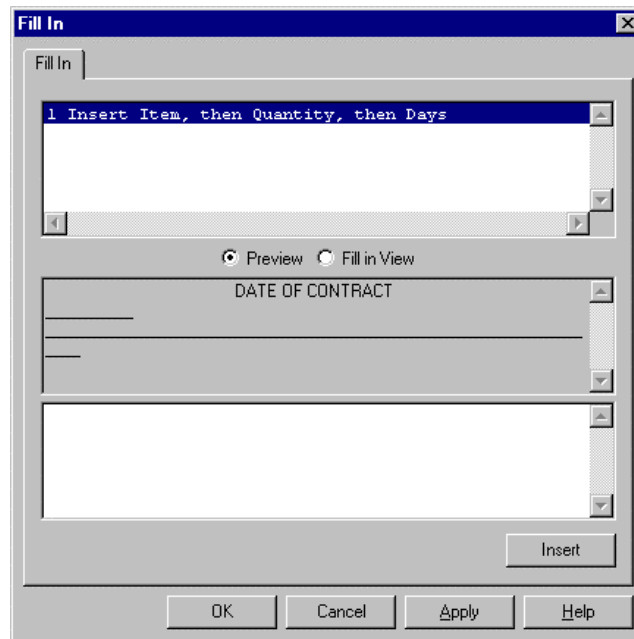


Figure 31 – Fill-In Screen

Either enter the fill-in by clicking the *Insert* button that will display a list of available items (fig. 32). Click the *Cancel* button and return to the *Fill-In Screen*.

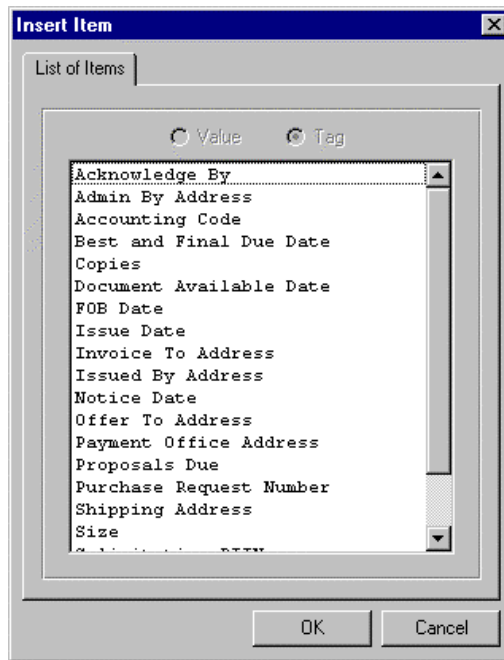


Figure 32 – Insert Item Screen

Otherwise, from the *Fill-In Screen*, click within the lower portion of the screen, and enter the fill-in text (fig. 33).

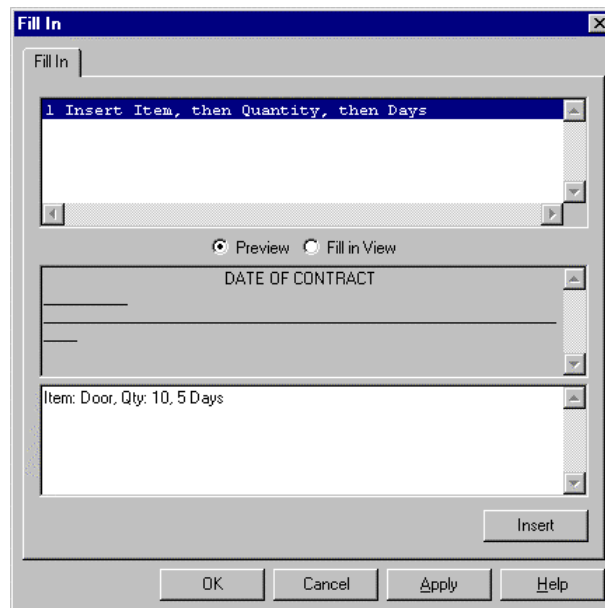


Figure 33 – Fill-In Screen

Click the *Apply* button that will display the fill-in text within the middle portion of the *Fill-In Screen* (fig. 34).

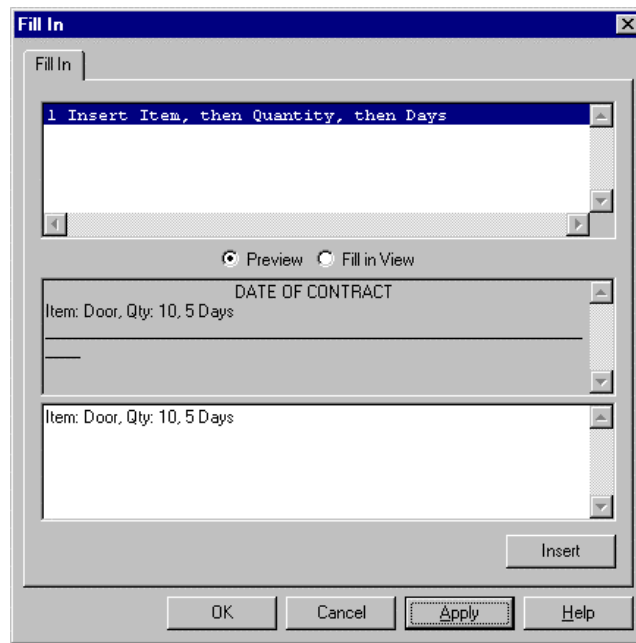


Figure 34 – Fill-In Screen

Users will click the *OK* button that will return to the *Attributes Screen*, then click the *OK* button, and return to the *Acquisition Regulations Research Browser*.

Edit/Update the Existing Local Matrix

To update the existing local matrix, users will need to click the *Local Matrix* button from the *Acquisition Regulation Research Browser*.

The *Local Matrices Screen* will display (fig. 35).

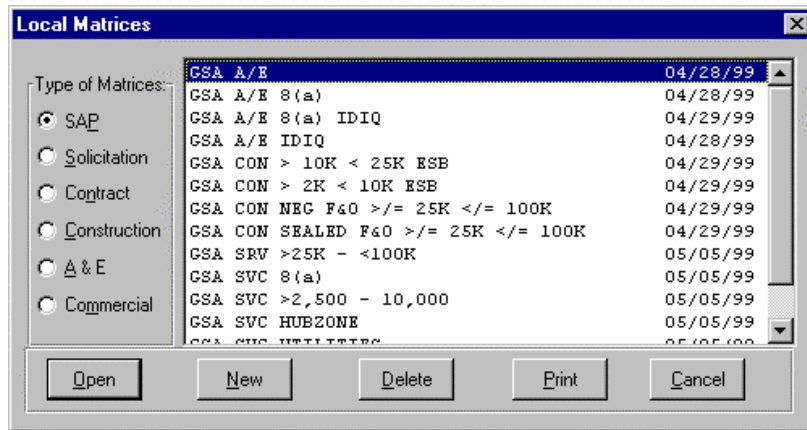


Figure 35 – Local Matrices Screen

From the *Local Matrices Screen*, users will have the ability to edit or update an existing local matrix.

Highlight the matrix type, then select the matrix from the list, and click the *Open* button that will display the type of matrix selected within the *Acquisition Regulation Research Browser* (fig. 36).

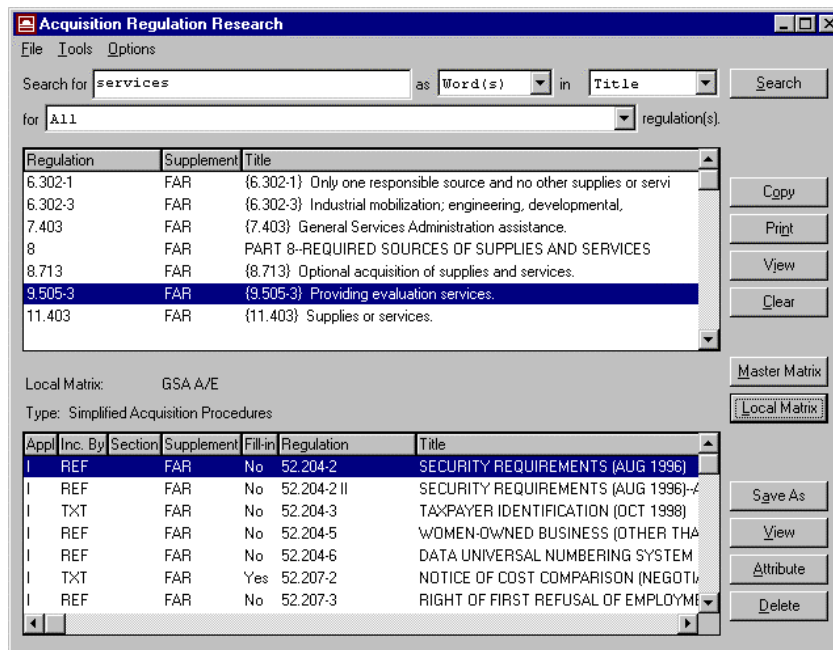


Figure 36 – Acquisition Regulations Research Browser

Users may edit or update the local matrix by clicking on the *Attribute* button.

Note: Users may add, delete clauses or make attribute changes to the clause.

From the *Attribute Screen*, users may change the clause attributes. When finished, click the *Save* button until he/she returns to the *Acquisition Regulations Research Browser*.

Delete the Existing Local Matrix

To delete the existing local matrix, users will need to click the *Local Matrix* button from the *Acquisition Regulation Research Browser*.

The *Local Matrices Screen* will display (fig. 37).

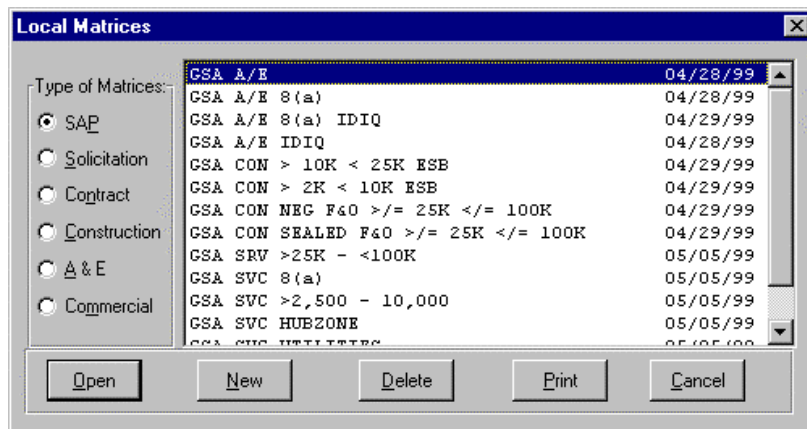


Figure 37 – Local Matrices Screen

From the *Local Matrices Screen*, users will have the ability to delete an existing local matrix.

Highlight the matrix type, then select the record from the list, and click the *Delete* button that will delete the selected local matrix.

Then click the *OK* button and return to the *Acquisition Regulation Research Browser*.

Print the Existing Local Matrix

To print a list of the clauses that are associated with a matrix, users will need to click the *Local Matrix* button from the *Acquisition Regulation Research Browser*.

The *Local Matrices Screen* will display (fig. 38).

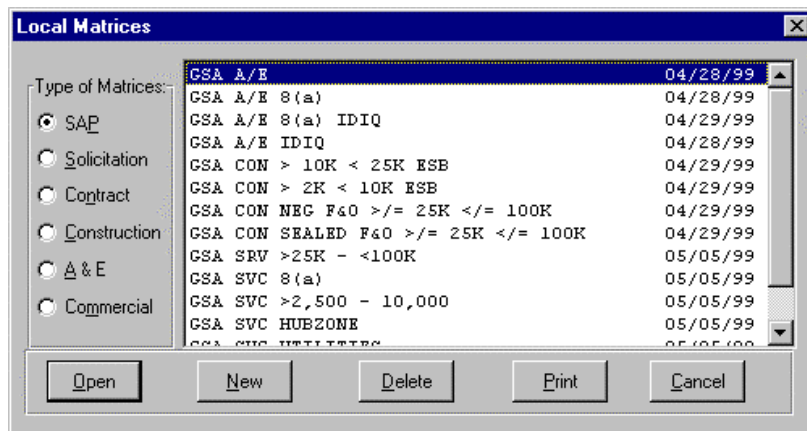


Figure 38 – Local Matrices Screen

From the *Local Matrices Screen*, users will highlight the desired matrix, then click the *Print* button.